

CalMentor

A&E Small Business Mentoring Program



Table of Contents

I.	INTRODUCTION	3
II.	MISSION STATEMENT	3
III.	PROGRAM GUIDELINES	3
SECTION 1	LOCATION	3
SECTION 2	PARTICIPANTS	4
A.	Mentors	4
B.	Protégés	4
C.	Program Sponsors	4
SECTION 3	PROGRAM STRUCTURE	4
A.	Pairing Process	4
B.	Establishing a Formal Relationship	5
C.	Evaluation and Feedback	5
D.	Recognition	5
SECTION 4	ADMINISTRATION	5
A.	Maintenance	5
B.	Dispute Resolution	5
C.	Recruitment	6
D.	Meetings	6
SECTION 5	STEERING COMMITTEE	7
A.	Composition	7
B.	Function	7

I. Introduction

The California Department of Transportation (Caltrans) District 11 and the San Diego Association of Governments (SANDAG) are pleased to invite your firm to participate in the new Calmentor mentor-protégé program. Initiated by Governor Schwarzenegger via Executive Order S-11-06, this program is designed to encourage and support small businesses through voluntary partnerships with mid-size and larger firms. Specifically, the program aims to increase the participation of small Architectural and Engineering (A&E) firms in public transportation projects in the San Diego region.

In order to make this program effective, Caltrans and SANDAG have partnered with the American Council of Engineering Consultants – California (ACEC-CA), and the Caltrans District 11 Small Business Council. A Steering Committee consisting of Caltrans and SANDAG staff plus several members of ACEC and the Caltrans District 11 Small Business Council have worked together to develop the enclosed program materials. Please take a moment to review them.

II. Mission Statement

Increase the pool of small businesses participating in transportation projects.

Goals and Objectives

- ◆ Establish a mentoring program that pairs small businesses with large firms.
- ◆ Enhance small business operations to achieve their growth potential.
- ◆ Create more small business opportunities and provide more meaningful participation on transportation projects.
- ◆ Establish an entry point for small firms who desire to do business with Caltrans, SANDAG, and other public agencies.
- ◆ Develop business relationships that foster new opportunities for both large and small firms.

III. Program Guidelines

Section 1 Location

As an advocate for the program, Caltrans will maintain all documents pertaining to the program. Caltrans will provide online access to the program information. Caltrans District 11 Headquarters will also serve as the facility where participants meet and perpetuate the program.

Section 2 Participants

Participants of the program are Mentors, Protégés, or program sponsors. Firms of all sizes are encouraged to participate. Each participant is defined as follows:

A. Mentors

Larger firms willing to commit time to help smaller firms achieve their growth potential.

B. Protégés

Small firms seeking A&E contracts with Caltrans, SANDAG, or other public agencies.

C. Program Sponsors

CALTRANS <http://www.dot.ca.gov/dist11>

Program sponsor seeking to facilitate a forum for small firms seeking opportunities to grow.

SANDAG <http://www.sandag.org/>

Co-sponsor of Calmentor program.

OTHER PUBLIC AGENCIES

Any public organization who also desires to sponsor the program.

ACEC-CA <http://www.acec-ca.org/>

The lead private organization sponsoring the program and working together with Caltrans and SANDAG is the American Council of Engineering Consultants – California (ACEC-CA).

Participation in the program is strictly voluntary.

Section 3 Program Structure

A. Pairing Process

- ◆ Mentor and Protégé submit an Application.
- ◆ Potential Mentor and Protégé meet and interview each other.
- ◆ Agree on areas of support and development.

Calmentor
Application for Mentor-Protégé Program
(For Potential Protégé only)

Business Name: _____
Address: _____
Phone: _____
President: _____
Type of Business: _____
Professional Reference: _____
Name: _____ Phone: _____

1. Please list three specific goals that your firm would like to gain from participating in the program?

2. Please list three areas that your firm brings to the relationship?

3. Do you have an interest in a particular firm or technical specialty? Yes ☐ No ☐

4. Is your firm currently DBE, WBE, DVBE, or SBE certified? Yes ☐ No ☐

5. If available, provide proof of current certification? Yes ☐ No ☐

6. Has your firm worked with any of the following agencies?

a. Caltrans	Yes <input type="checkbox"/> No <input type="checkbox"/>
b. SANDAG	Yes <input type="checkbox"/> No <input type="checkbox"/>
c. Local Agencies	Yes <input type="checkbox"/> No <input type="checkbox"/>
d. Other governmental agencies	Yes <input type="checkbox"/> No <input type="checkbox"/>

7. How long has your firm been in business?

2005	2006	2007
Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

8. Does your firm want the criteria to qualify for California Small Business certification? Yes ☐ No ☐

* One required to participate in the program.

--- Upon completion, please fax this document with ---
America Resources, Caltrans District 11 or 4075 York Road, San Diego, CA 92121, email amrca@amrca.com

Calmentor
Application for Mentor-Protégé Program
(For Potential Mentor only)

Business Name: _____
Address: _____
Phone: _____
President: _____
Type of Business: _____
E-Mail Address: _____
Type of Business: _____

1. Please list three specific goals that your firm would like to gain from participating in the program?

2. Please list three areas that your firm brings to the relationship?

3. Has your firm worked with any of the following agencies?

a. Caltrans	Yes <input type="checkbox"/> No <input type="checkbox"/>
b. SANDAG	Yes <input type="checkbox"/> No <input type="checkbox"/>
c. Local Agencies	Yes <input type="checkbox"/> No <input type="checkbox"/>
d. Other governmental agencies	Yes <input type="checkbox"/> No <input type="checkbox"/>

4. How long has your firm been in business?

2005	2006	2007
Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

--- Upon completion, please fax this document with ---
America Resources, Caltrans District 11 or 4075 York Road, San Diego, CA 92121, email amrca@amrca.com

B. Establishing a Formal Relationship

- ◆ Draft a Memorandum of Understanding (MOU).
 - Describe the goals and objectives (Examples are "Improve the protégé's business development skills by pursuing at least one project together" or "Improve the protégé's business practices by sharing financial policies and procedures").
 - Develop method or approach to achieving the goals and objectives.
 - Establish a mentoring duration.

C. Evaluation and Feedback

- ◆ Mentor and Protégé review milestones in their MOU.
- ◆ File progress report with Caltrans and SANDAG every 3 months.

D. Recognition

- ◆ Evaluate accomplishments.
- ◆ Review metrics that measure growth and development of Protégé and recognize contributions of mentors.
- ◆ Celebrate success at 1-year anniversary meeting.

Section 4 Administration

A. Maintenance

Program maintenance requires the following:

- ◆ Monitoring the status of mentors and protégés that are already committed, as well as their anticipated completion date.
- ◆ Assisting small firms with the pairing process.
- ◆ Updating the program website:
 - Standard application. <http://dot.ca.gov/dist11/calmentor/>
 - Standard MOU.
 - Frequently asked questions.
 - Disclaimer.
 - Calendar of steering committee meetings.

B. Dispute Resolution

Participation in the Calmentor program is voluntary. Disputes between two parties may be referred to the Steering Committee for discussion and recommendation.

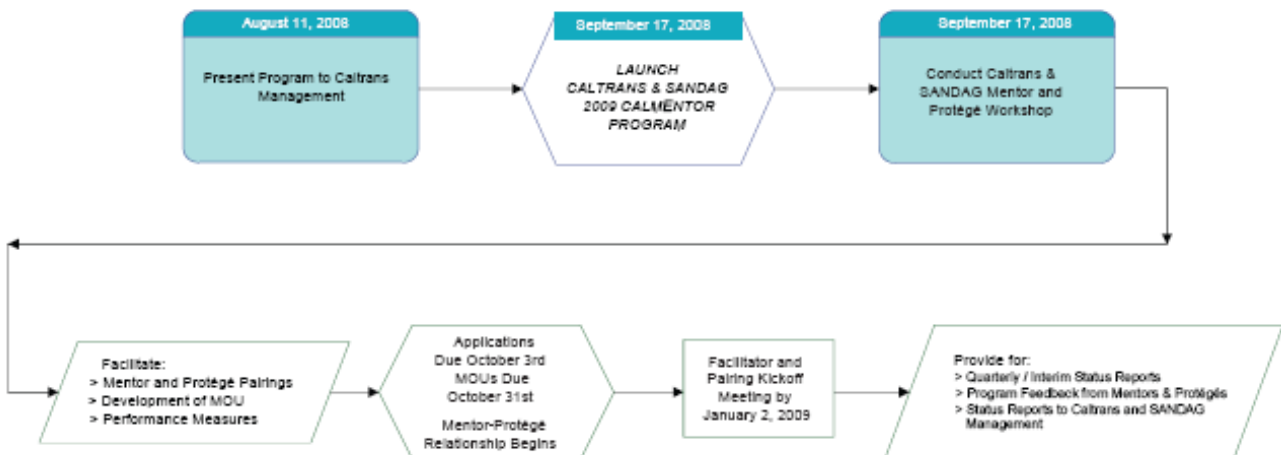
C. Recruitment

- ◆ Communicate to other professional societies about the program.
- ◆ Inform potential participants of the website.
- ◆ Participate in the 1-year anniversary meeting.
- ◆ Maintain and distribute a program brochure.

D. Meetings

Annual meetings will be held in September for feedback, evaluation, networking, recognition, and recruitment.

2009 Mentor-Protégé Program Plan



Section 5 Steering Committee

The Steering Committee is created to help guide and maintain the Calmentor program. The role of the steering committee is as follows:

- ◆ Collaboratively manage all aspects of the Calmentor program including development, marketing, implementation, and maintenance of the program.
- ◆ Ensure the success by monitoring, providing feedback, and reporting on Program Performance.
- ◆ Provides support in reviewing the agreements.
- ◆ Assists with resolution of potential disagreements.
- ◆ Sets the policies and procedures for the program.
- ◆ Suggestions to Improve the Program in future years.
- ◆ Act as an advisory body to ACEC-CA.



The following is the composition and function of the Steering Committee:

A. Composition

The Steering Committee for the Calmentor Program consists of two Caltrans District 11 representatives, two SANDAG representatives, four ACEC members, and two representatives from the Caltrans District 11 Small Business Council.

B. Function

The Steering Committee has the authority and the responsibility to direct and manage all affairs of the Calmentor Program.



Arnold Schwarzenegger
Governor,
State of California

Dale E. Bonner
Secretary of the Business,
Transportation and Housing Agency

Will Kempton
Director,
Dept of Transportation